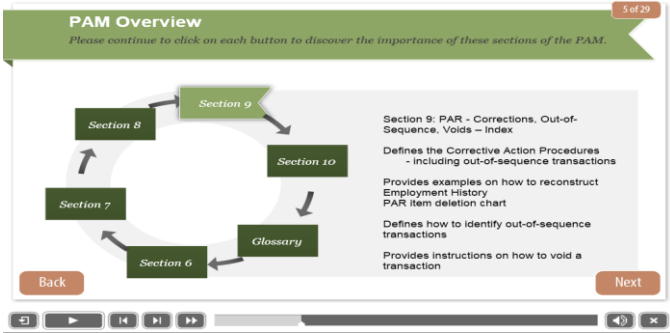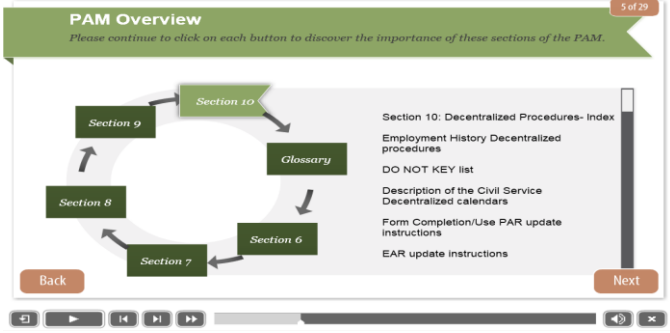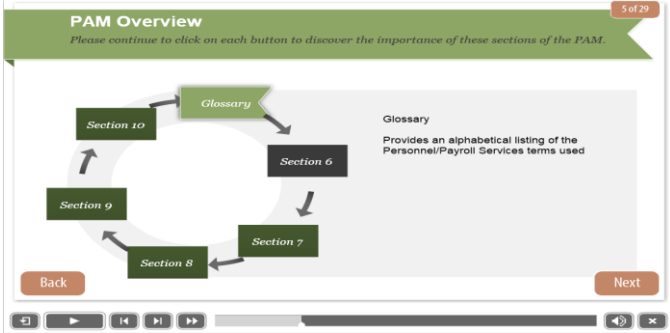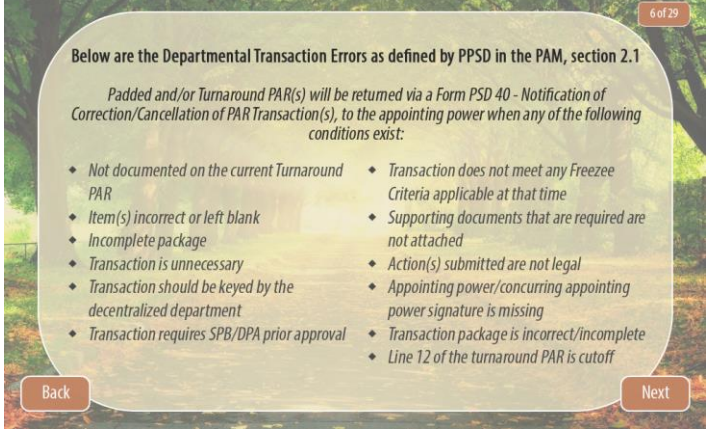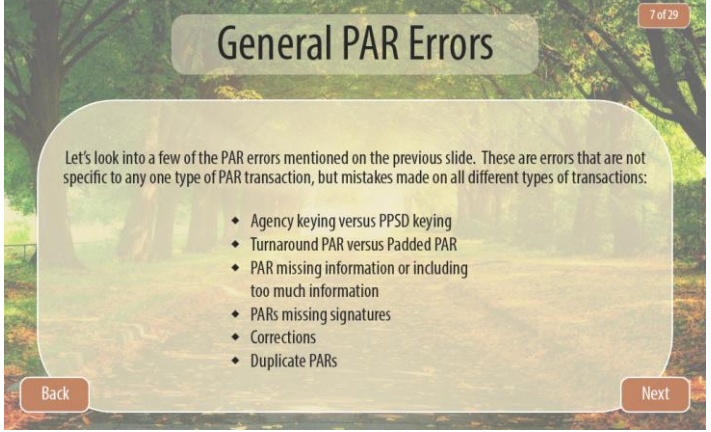| Pg	Slide	Content
1.		*Welcome to the State Controller's Office* **PAR Errors:** How to Identify Them and How to Avoid Them
2.	**Normal State** **Tools State** **Gavel State**	**Normal State:** Please click on the images above for important information regarding this eLearning. **Tools State:** To advance through the course, click the "Next" button on each slide. Should you have problems viewing or playing this course, please contact the Personnel/Payroll Training Services Unit at ppsdtraining@sco.ca.gov to request assistance. Note that this training contains no audio. **Gavel State:** Training course materials are the exclusive property of the State Controller's Office (SCO). Unauthorized copying and use of SCO's training materials, without the expressed written permission of the Personnel/Payroll Services Division's Statewide Training Unit, is prohibited. Please do not use training course materials in lieu of the appropriate legal and regulatory references. MOU's SHALL supersede the government codes and laws/rules covered in eLearning and classroom training. All examples and scenarios are fictional. Any similarities between characters and agencies are purely coincidental. **Books Instructions:** The purpose of this training is to provide an additional resource for personnel employees to accurately determine and avoid the common PAR errors sent to PPSD for keying. You will need to verify your resources in all transactions.

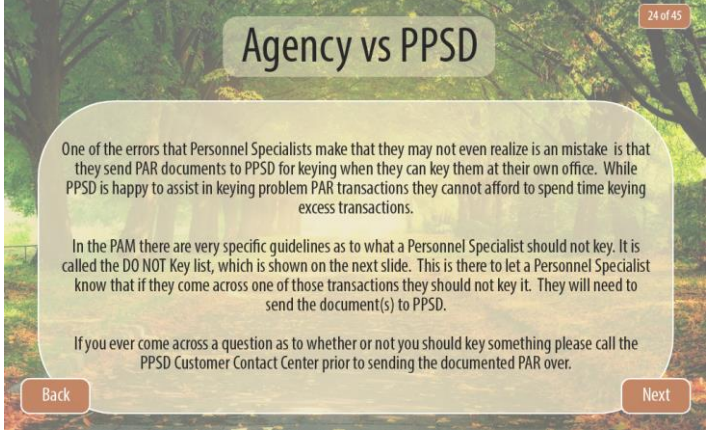| Pg	Slide	Content
	Books State	Please do not use this eLearning as a replacement for departmental or classroom training.
3.		**What are PAR Errors?** When Personnel Specialists have trouble with a Personnel Action Request (PAR) transaction, and they cannot key it at their office, they will send it off to SCO's Personnel and Payroll Services Division (PPSD) for keying. However, sometimes the PAR documents are not completely filled out, or they are incorrect. These errors are called PAR Errors. Each agency will receive these errors back from the PPSD unit so that they can be fixed. Notices may be sent via email, over the phone, and in the mail. The purpose of this eLearning is to shed light on some of the most common general PAR errors, and to educate Personnel Specialists so that they can avoid these mistakes in the future.
4.	**PAM Overview**	**PAM Overview** One of the biggest resources for a PS is the PAM. Click on each button to discover the importance of each section of the PAM. PAM can also be accessed online.

Pg	Slide	Content
	Table of Contents	**Table of Contents** Provides easy access to information contained in the PAM
	Section 1	**Section 1: System Information** Is used to give background information on the Employment History System Provides information on all the PIMS system agencies and their conversion dates Employment History decentralized agencies and their conversion dates Gives contact information for the PPSD and other SCO contacts
	Section 2	**Section 2: PAR Purpose/Use** Padded/Turnaround PAR explanation Information on PPSD error messages List of Turnaround PAR transactions Detailed descriptions of how to properly document the PAR, lines 1 through 11 Detailed descriptions of the Employment History information in line 12.
	Section 3	**Section 3: PAR Transactions** Instructions of how to use the Required/Conditional charts Detailed descriptions on how to properly document all appointment transactions Detailed descriptions on how to properly document all miscellaneous transactions Detailed descriptions on how to properly document all separation transactions
	Section 4	**Section 4: PAR - Personnel Operations Initiated Actions/Reports** Notes on Mass Updates SISA/MSA register and sample documents Monthly expiration date reports initiated by PPSD - Description of the report and its purpose Monthly CB ID Audit Report - Description of the report and its purpose
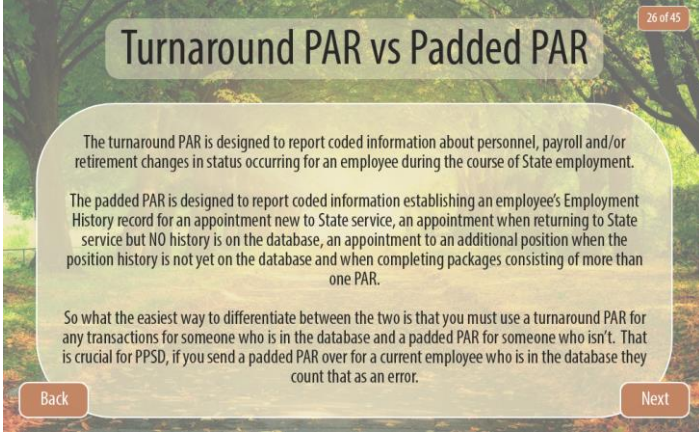
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	Section 5	**Section 5: PAR - Special Instructions** Breaks down any special instructions needed for various transactions (i.e. Adverse Actions) Breaks down any special instructions needed for various PAR line items (i.e. line 215) Defines how to work transaction packages
5.	**PAM Overview**	**PAM Overview** Please continue to click on each button to discover the importance of each section of the PAM.
	Section 6	**Section 6: Employee Action Request (EAR) - Purpose/Use** Defines the purpose and use of the Employee Action Request (EAR) In depth explanation of each section of the EAR AND Section 6: Separation Form Processing Explanation of Separation/Disposition of CalPERS Contributions (STD 687) - Including item definitions from the form
	Section 7	**Section 7: Notice of Personnel Action (NOPA)** Defines the purpose and use of the Notice of Personnel Action (NOPA) Explains NOPA generation Provides sample NOPA forms

Pg	Slide	Content
	Section 8	**Section 8: Processing of Transactions – Index** Defines the role of the employee and appointing power for the following civil service transactions: - Appointments: current, returning, new employees, promotion, and inter-departmental - Miscellaneous - Separations - Out-of-Sequence - Deceased Employees
	Secton 9	**Section 9: PAR - Corrections, Out-of-Sequence, Voids – Index** Defines the Corrective Action Procedures - including out-of-sequence transactions Provides examples on how to reconstruct Employment History PAR item deletion chart Defines how to identify out-of-sequence transactions Provides instructions on how to void a transaction
	Section 10	**Section 10: Decentralized Procedures- Index** Employment History Decentralized procedures DO NOT KEY list Description of the Civil Service Decentralized calendars Form Completion/Use PAR update instructions EAR update instructions How to resolve transaction coding or key entry errors Retirement System Transaction (RST) update Duplicate PAR request instructions Employment History data base restore process Details the Inquiry Procedures Provides telephone contacts History Type Chart Duplicate PAR requests
	Glossary	**Glossary** Provides an alphabetical listing of the Personnel/Payroll Services terms used

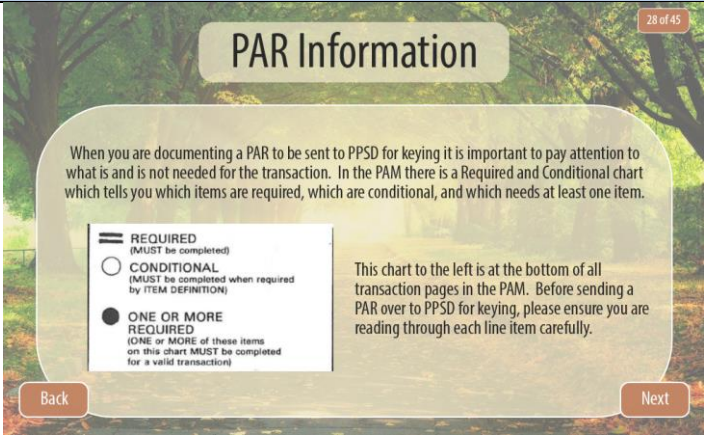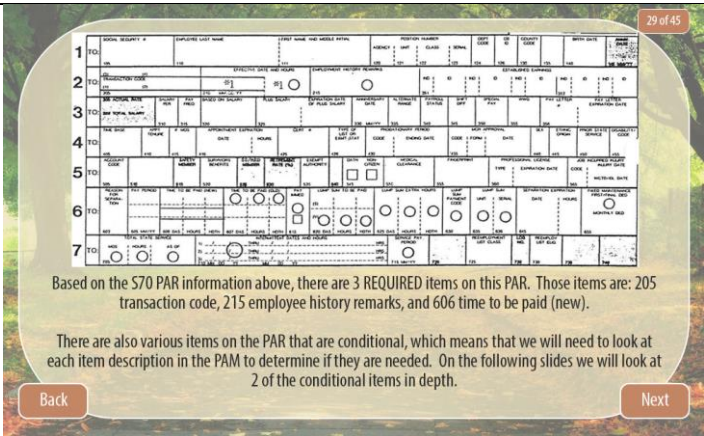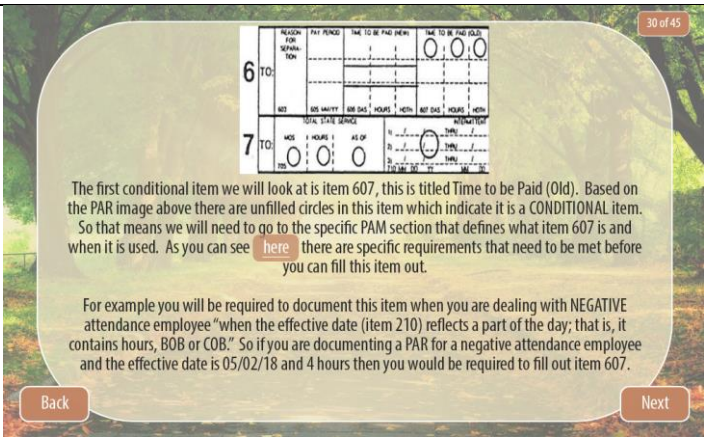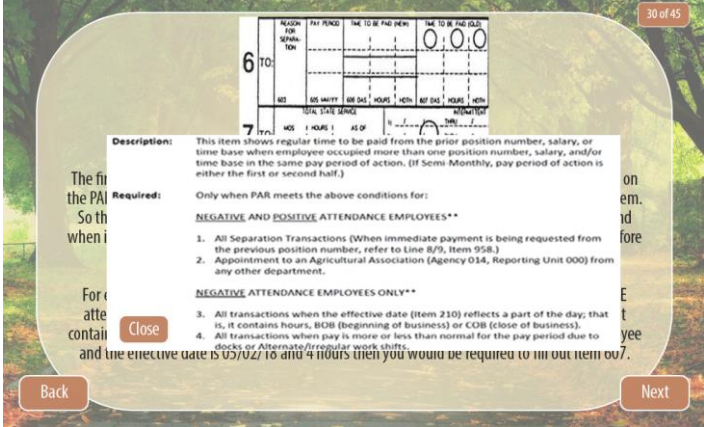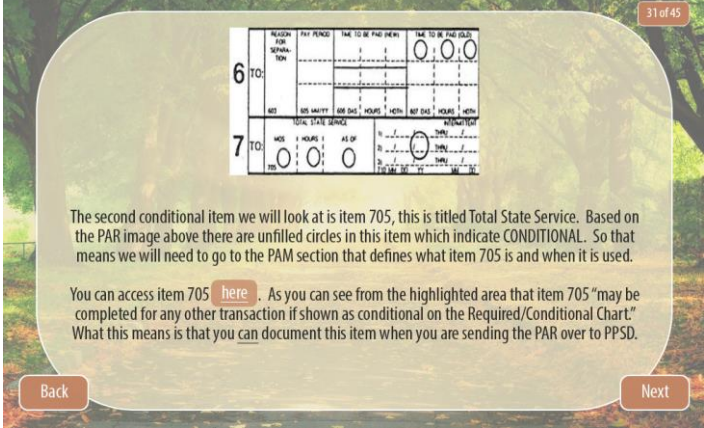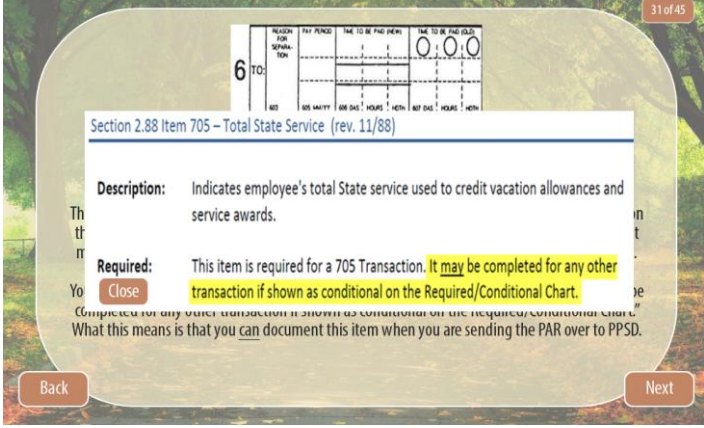| Pg	Slide	Content
6.		**Below are the Departmental Transaction Errors as defined by PPSD in the PAM, section 2.1** *Padded and/or Turnaround PAR(s) will be returned via a Form PSD 40 - Notification of Correction/Cancellation of PAR Transaction(s), to the appointing power when any of the following conditions exist:* • Not documented on the current Turnaround PAR • Item(s) incorrect or left blank • Incomplete package • Transaction in unnecessary • Transaction should be keyed by the decentralized department • Transaction requires SPB/CalHR prior approval • Transaction does not meet any Freeze Criteria applicable at that time • Supporting documents that are required are not attached • Action(s) submitted are not legal • Appointing power/concurring appointing power signature is missing • Transaction package is incorrect/incomplete • Line 12 of the turnaround PAR is cutoff
7.		## General PAR Errors Let's look into a few of the PAR errors mentioned on the previous slide. These are errors that are not specific to any one type of PAR transaction, but mistakes made on all different types of transactions: • Agency keying versus PPSD keying • Turnaround PAR versus Padded PAR • PAR missing information or including too much information • PARs missing signatures • Corrections • Duplicate PARs

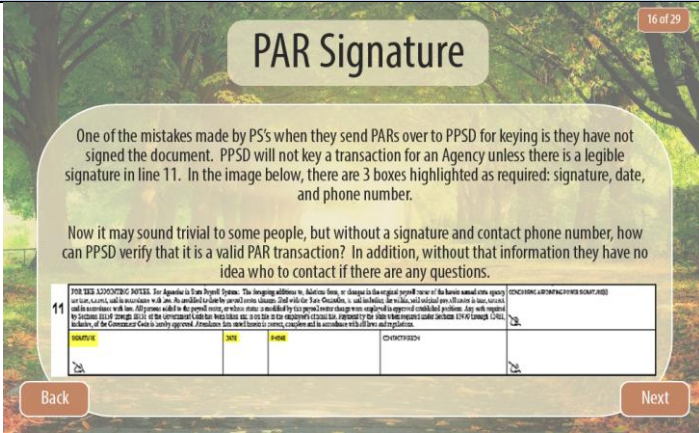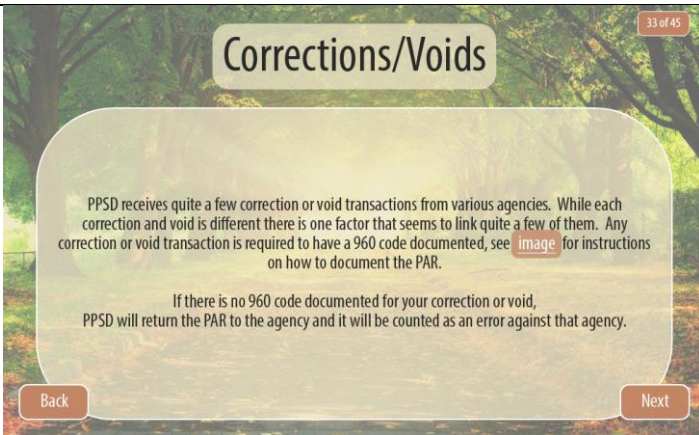| Pg	Slide	Content
8.		**Agency vs PPSD** One of the most common errors that Personnel Specialists make, is sending PAR documents to PPSD for keying when they should key them at their own office. While PPSD is happy to assist in keying problem PAR transactions, they cannot afford to spend time keying any excess transactions. In the PAM, there are very specific guidelines outlining what a Personnel Specialist should not key. One set of instructions is called the DO NOT Key list. This list is there to outline for Personnel Specialists what they should not key and what needs to be sent to PPSD. In addition, as you are documenting a PAR you might come across a note on one of the Required/Conditional Charts that tells you to send the document to PPSD for keying. If you ever come across a question as to whether or not you should key something, please call the PPSD Customer Contact Center, (916) 372-7200, prior to sending the documented PAR over.
9.		**DO NOT KEY** Transactions which meet any of the conditions below; submit them to PPSD for keying, If any transactions in a package meet any of these conditions, submit the entire package to PPSD for keying. • Out-of-sequence transaction involving multiple departments • R01 Voids • Void/Correction to adverse actions/rejections during probationary period due to appeal process • Adverse Action "exceptions" refer to 5.70 • 105 transaction • Emergency appointment for negative attendance employee and item 615 is NOT completed • Item 105is completed with "SS5" • Item 952 is completed • Item 999 is completed • S99 transaction • Void of separation with lump sum and/or lump sum extra hours and reporting separation with a different effective date
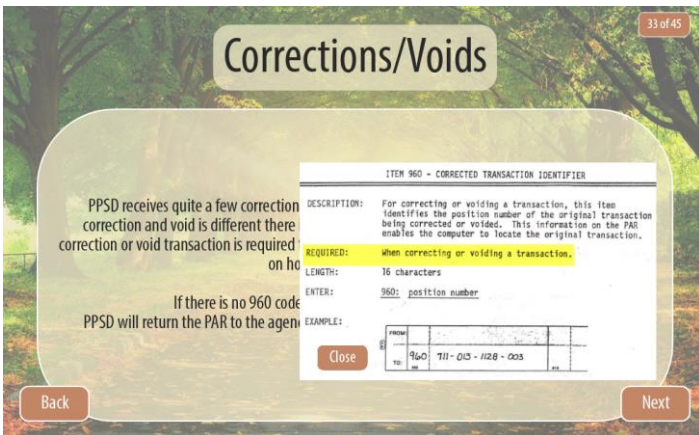
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		• Adding additional federal or state withholding and last name contains an apostrophe and/or hyphen. Pulled from PAM section 10.2.
10.		**Turnaround PAR vs Padded PAR** The **turnaround PAR** is designed to report coded information about personnel, payroll and/or retirement changes in status occurring for an employee during the course of State employment. The **padded PAR** is designed to report coded information establishing an employee's Employment History record for an appointments that are: new to State service, when returning to State service but NO history is on the database, an additional position when the position history is not yet on the database and when completing packages consisting of more than one PAR. One of the simplest way to differentiate between the two is to use a turnaround PAR for any transactions for someone who is in the database and a padded PAR for someone who is not. This is crucial for PPSD! If you send a padded PAR for a current employee who is in the database, PPSD will count that as an error. Please reference your PAM for any additional information on documenting additional positions.
11.		**Turnaround PAR vs Padded PAR** **Pro Tip for Appointments:** Section 3 of the PAM shows you how to determine whether to use the turnaround or padded PAR. ****Note: ALL 105 transactions MUST be sent to PPSD on the turnaround PAR.**

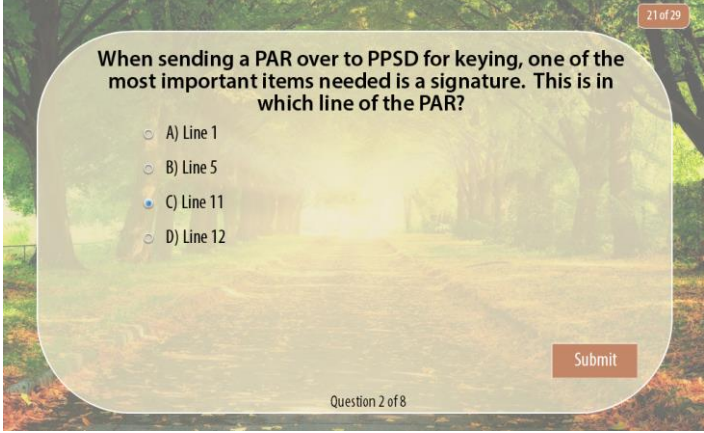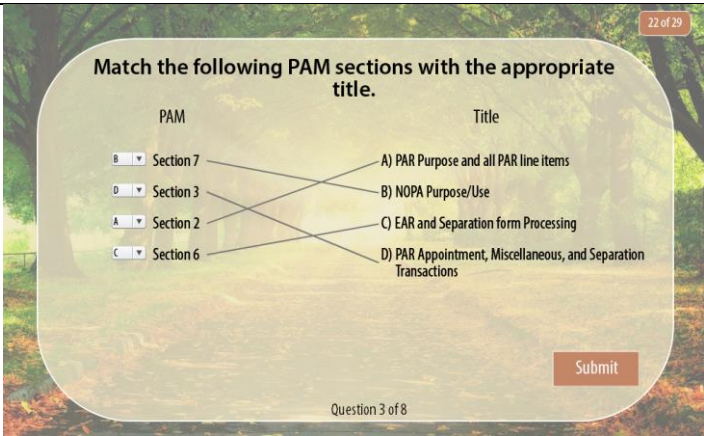| Pg	Slide	Content
12.		**PAR Information** When documenting a PAR to be sent to PPSD for keying, it is important to pay attention to what is and is not needed for the transaction. In the PAM, there is a Required and Conditional chart that tells you which items are required, which are conditional, and which needs at least one item. This chart to the left is at the bottom of all transaction pages in the PAM. Before sending a PAR over to PPSD for keying, please ensure you are reading through each line item carefully.
13.		Based on the S70 PAR information above, there are only 3 REQUIRED items on this PAR. Those items are: 205 transaction code, 210 effective date, and 606 time to be paid (new). There are also various items on the PAR that are conditional, which means that we will need to look at each item description in the PAM to determine if they are needed. On the next slides, we will look at 2 of the conditional items in depth.
14.	 **Normal State**	The first conditional item we will look at is item 607, this is titled Time to be Paid (Old). Based on the PAR image above, there are unfilled circles in this item which indicate it is a CONDITIONAL item. This means we will need to go to the specific PAM section that defines what item 607 is and when it is used. As you can see here, there are specific requirements that need to be met before you can fill this item out. For example you will be required to document this item when you are dealing with a NEGATIVE attendance employee or "when the effective date (item 210) reflects a part of the day; that is, it contains hours, BOB or COB." So, if you are documenting a PAR for a negative attendance employee, and the effective date is 05/02/18 and 4 hours then you would be required to fill out item 607.
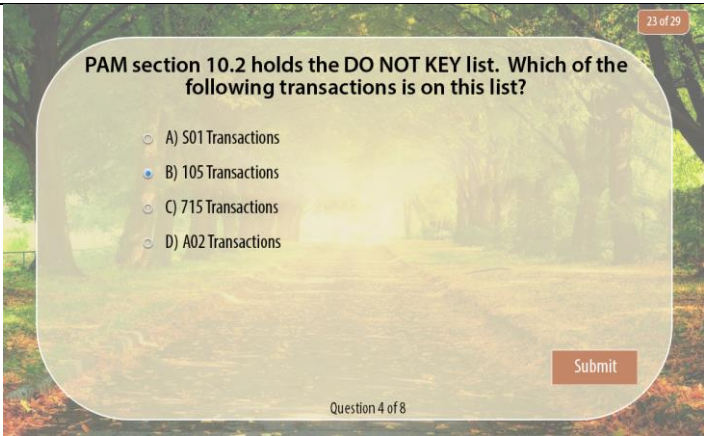
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	\n**Pop Out State**	
15.	\n**Normal State**\n\n\n**Pop Out State**	The second conditional item we will look at is item 705, titled Total State Service. Based on the PAR image above, there are unfilled circles in this item which indicate CONDITIONAL. This means we will need to go to the PAM section that defines what item 705 is and when it is used.\n\nYou can access item 705 here. As you can see from the highlighted area, item 705 "may be completed for any other transaction if shown as conditional on the Required/Conditional Chart." What this means is that you <u>can</u> document this item whether it is being keyed at the Agency level or being sent over to PPSD.

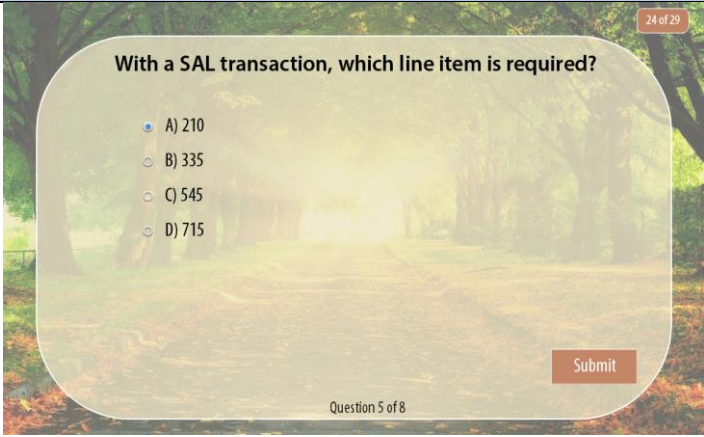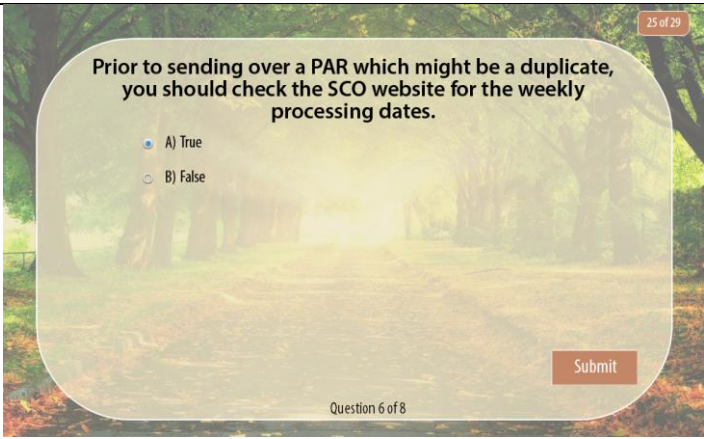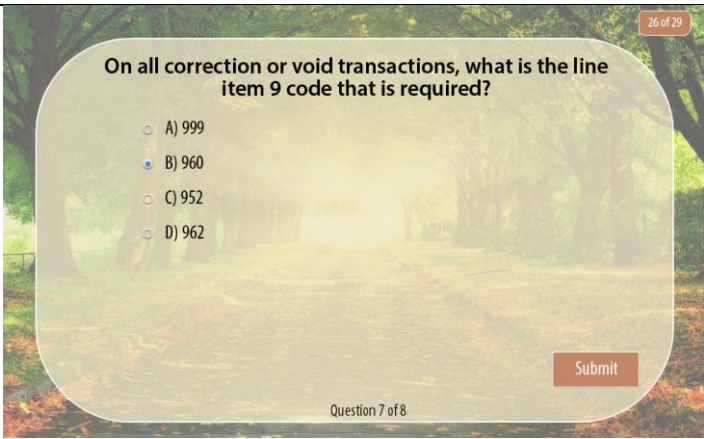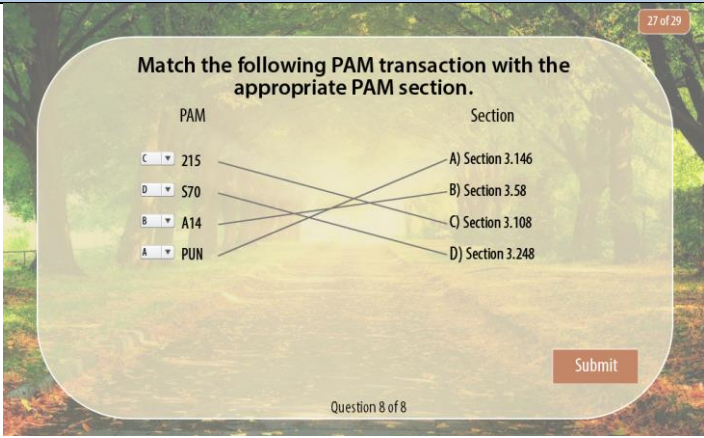| Pg	Slide	Content
16.		**PAR Signature** One of the mistakes made by PS's when they send PARs over to PPSD for keying is they have not signed the document. PPSD will not key a transaction for an Agency unless there is a legible signature in line 11. In the image below, there are 3 boxes highlighted as required: signature, date, and phone number. Now it may sound trivial to some people, but without a signature or contact phone number, how can PPSD verify that it is a valid PAR transaction? In addition, without that information they have no idea who to contact if there are any questions.
17.	 **Normal State** **Pop Out State**	**Corrections/Voids** PPSD receives quite a few correction or void transactions from various agencies. While each correction and void is different, there is one factor that seems to link quite a few of them. Any correction or void transaction is required to have a 960 code documented (see image for instructions on how to document the PAR). If there is no 960 code documented for your correction or void, PPSD will return the PAR to the agency, and it will be counted as an error against that agency.

Pg	Slide	Content
18.		**Duplicate PARs** The final PAR error that we will investigate is regarding duplicate PARs. There can be times when a PAR is sent to PPSD for keying but days, weeks, or months go by, and it has still not been keyed. When that happens, many people resend the PAR to PPSD. However, DON'T DO THAT...yet. If a duplicate PAR is received by PPSD they will count that as an error against the agency. Instead of sending a new PAR, there are 2 things you should do first: 1. Check the SCO HR website for the Weekly Processing Dates. 2. Call the PPSD Customer Contact Center to verify if they have received the PAR. If you have completed both of those steps and PPSD advised they have not received the PAR, then and only then should you resend the PAR.
19.		**QUIZ** Now that you are aware of some of the common PAR error messages let's take a quick quiz to test your knowledge. The following slides contain 8 questions that are in reference to the PAR errors we have discussed, as well as questions specific to the PAM. Please make sure you have your PAM handy, or you can access the digital copy online. Good Luck!
20.		According to PAM section 3.32, this A02 transaction should be documented on what kind of PAR? A) Turnaround PAR **B) Padded PAR**

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21.		When sending a PAR over to PPSD for keying, one of the most important items needed is a signature. This is in which line of the PAR? A) Line 1 B) Line 5 **C) Line 11** D) Line 12

22.		Match the following PAM sections with the appropriate title.
		
		Section 7, Section 3, Section 2, Section 6
		
		A) PAR Purpose and all PAR line items
		    • Section 2
		B) NOPA Purpose/Use
		    • Section 7
		C) EAR and Separation form Processing
		    • Section 6
		D) PAR Appointment, Miscellaneous, and Separation Transactions
		    • Section 3

23.		PAM section 10.2 holds the DO NOT KEY list. Which of the following transactions is on this list? A) S01 Transactions **B) 105 Transactions** C) 715 Transactions D) A02 Transactions

Pg	Slide	Content
24.		With a SAL transaction, which line item is required? **A) 210** B) 335 C) 545 D) 715
25.		Prior to sending over a PAR, which might be a duplicate, you should check the SCO website for the weekly processing dates. **A) True** B) False
26.		On all correction or void transactions, what is the line item 9 code that is required? A) 999 **B) 960** C) 952 D) 962

Pg	Slide	Content

27.		Match the following PAM transaction with the appropriate PAM section.
		
		215, S70, A14, PUN
		
		A) Section 3.146
		    • PUN
		B) Section 3.58
		    • A14
		C) Section 3.108
		    • 215
		D) Section 3.248
		    • S70

28.		Quiz Results Slide
29.		**THANK YOU!!** Congratulations! You have successfully completed this eLearning on PAR Errors. We thank you for your participation. Please click the link below to download your certificate of completion.